



CITY OF LODI

COUNCIL COMMUNICATION

AGENDA TITLE: Vision 2000 Strategic Planning Effort Update

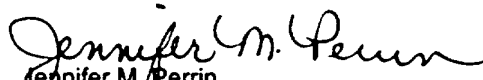
MEETING DATE: October 19, 1994

PREPARED BY: City Clerk

RECOMMENDED ACTION: None required.

BACKGROUND INFORMATION: Mr. Jim Conklin will be present at the October 19, 1994 City Council meeting to give a brief status report on the Vision 2000 strategic planning effort update.

FUNDING: None required.


Jennifer M. Perrin
City Clerk

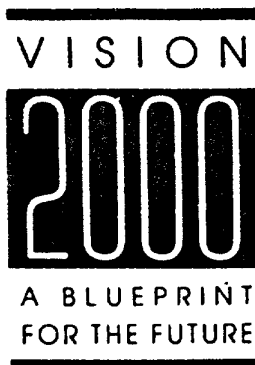
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APPROVED

THOMAS A. PETERSON
City Manager



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October 7, 1994

OCT 11 94

City Manager's Office

Tom Peterson, City Manager
City of Lodi
P. O. Box 3006
Lodi, CA 95241-1910

Dear Tom:

As you hopefully are aware the Business Council has recently initiated an update of its countywide 1990 Vision 2000 strategic planning effort. I would request that time be made available on one of your October City Council agendas so that a representative of the Business Council and myself could present a five minute status report on this Vision 2000 update effort. Please be advised that, unlike the 1990 program, the Business Council is not requesting any financial contribution from the city but rather simply wishes to present the update program to the Council and hopefully receive an approval in concept regarding the program. The Business Council plans to raise the necessary funding completely from private sector funds. A total of \$70,000 is anticipated for the project and \$50,000 has already been raised through commitments by The Record, the San Joaquin Partnership, Bank of Stockton, Westside Bank (Tracy), Stockton Savings Bank, St. Joseph's Regional Health System, Anheuser-Busch, American Savings Bank, Teichert Construction and others.

Please advise me as soon as possible at 477-8101 regarding the scheduling of this brief presentation. We hope to conclude the eight public sector presentations no later than October 31st.

Sincerely,

JIM CONKLIN

BUSINESS COUNCIL INC. OF SAN JOAQUIN COUNTY

2800 West March Lane, Suite 473 Stockton, California 95219 (209) 956-3380 Fax (209) 956-1520

VISION 2000

'95 Re-Look

I. INITIAL PROCESS:

In 1990, the Business Council of San Joaquin County, the County and 7 cities joined forces to identify and analyze the crucial economic development issues facing our community. A total of \$100,000 was raised for this effort from both the private sector (\$71,500) and from the public sector (\$28,500).

The steps undertaken in the initial process included...

A. Information Gathering (2 months)

1. Regional Economic Analysis
2. Stakeholder Interviews (100 each +/-)
3. Assets/Liabilities Analysis (Business Climate Report, Dec. '89)

B. Synthesis (2 months)

1. Target Industry & Analysis
 - Link Between Industry Needs & Community Resources
2. Key Issue Analysis
 - Identified Most Important Conclusions

C. Process (2 months)

1. Community Leadership Workshops (3 each w/ 30 participants +/-)
 - Identify Issues
 - Prioritize Action Agenda
 - Consensus Building

D. Strategy

1. Develop Draft Report & Distribute
2. Final Strategy & Implementation Plan

II. OUTCOME (VISION 2000):

The results of the above process culminated in the Vision 2000 Strategic Plan. Recommendations contained in the plan fell into three broad categories. These are as follows...

A. Regional Growth Management

Recommendations:

- Broaden the role of the Council of Governments (COG) to include development of a regional growth management plan and process
- Develop a regional Growth Management Strategy to guide public and private sector decisions as the County moves toward diversification.
- Develop a regional infrastructure financing plan for industries targeted for attraction and expansion.

Outcomes:

- Strengthening of COG, recognition as a regional leader.
- Passing of Measure "K" (1/2 % sales tax to fund transportation enhancements)
- IMP (Habitat Management Plan - County wide mitigation guidelines)

B. Human Resources Development

Recommendations:

- Establish a Regional Human Resources task force to expand on the work of the Vision 200 study.
- Develop a human resources development strategy.
- Concentrate on efforts to develop and maintain a quality work force.

Outcomes:

- Human Resources Task Force
- Career Day (Excellent Adventure)
- Incentives through the Private Industry Council (PIC)

C. Economic Development

Recommendations:

- Create a regional marketing entity and a regional marketing program to promote San Joaquin County.
- Coordinate existing economic development efforts in San Joaquin County.
- Develop a detailed economic development strategy for San Joaquin County.

Outcomes:

- Establishment of the S.J. Partnership
- Raising of over \$5 million from the public and private sector to fund the Partnership
- Enterprise Zones

III. THE RE-LOOK:

A. Develop Desired Goals/Structure

1. Set Expectations
2. Evaluate Resource Requirements
3. Define Involvement of Various Parties
Business Council, Conklin Marketing, ESG, Others
4. Develop Time-Frame
5. Solicit Investments in the Plan

B. Data Gathering & Analysis

1. Regional Economic & Fiscal Analysis
2. Business Climate Analysis
3. Target Industry Analysis
4. Stakeholder Interviews

C. Key Issue Analysis

1. Weigh & Prioritize Issues Identified
2. Incorporate new issues identified by the Vision 2000 Steering Committee

D. Community Workshops

1. Expand Involvement
2. Communicate Successes/Progress

E. Compile Results/Draw Action Plans

1. Assemble Data Obtained
2. Draw Conclusions
3. Draft & Final Reports

F. Communicate Revisions

1. Publish Results
2. Mail to Involved Parties
3. Speak to Various City Councils & County Board

G. Follow-Through

1. Create Various Task Forces as Required to Address
Recommendations.

VISION 2000

'95 Re-look

Executive Summary

The original *Vision 2000* Plan was not an end product, but rather a beginning step in uniting the county. Like any good strategic planning process, it must have a life of its own and must constantly be re-addressed as the inevitable; change, occurs.

It was decided two years ago at the Business Council retreat that it was time to re-address *Vision 2000*. Several major changes have occurred which include the implementations that resulted from the original plan along with a major shift in the economy.

Our goal is to produce a document that can provide guidance and direction for the next several years. To successfully accomplish this, we have entered into a contract with Economic Strategies Group (ESG) to perform the data collection and analysis. Jack Tomasik is the principal in ESG and was the individual responsible for the original *Vision 2000* report under Mountain West/Coopers & Lybrand. Jack has completed approximately 25 plans since our original report was concluded and is currently performing the same service for Contra Costa County. Due to his concurrent involvement in the East Bay, we were able to negotiate an extremely reasonable rate for their work.

The process will somewhat mirror the initial tasks and a complete breakdown is included in the description of ESG's work. The major categories include...

- Economic & Fiscal Analysis
- Business Climate Analysis
- Stakeholder Interviews
- Key Issue Analysis
- Community Workshops
- Strategy & Implementation Plan (Draft & Final)

We believe that a key unifying element in the process is the interviews. Through these, we will try to expand and enhance upon the information developed during the previous report. Our goal is to get as much representation from each of the different interest groups (Stakeholders) as possible.

In addition to ESG's work, there is a substantial amount of coordination that must occur to pull off each of the required steps. Conklin Marketing has been retained to provide a portion of this coordination effort. Jim Conklin was instrumental in the coordination of the initial process and will bring valuable insight into the details of the process. A list of his proposed services is included for reference.

Producing a quality, effective report will not be inexpensive. Combining costs for the above consultants along with printing and mailing could total nearly \$70,000 (see budget). The Business Council does not have an allotted budget for this expense. We have therefore been soliciting sponsorships from local businesses and have commitments of nearly \$50,000 to date. In addition, the San Joaquin Partnership is considering additional financing as well.

We sincerely feel that there is a strong need for re-unification in the county and that the *Vision 2000 Re-Look* can provide the "Wake-up Call."

Doug Urbick
John Nunn

October 9, 1994

VISION 2000

'95 Re-look

Objectives

1. To position Vision 2000's recommendations and findings as the most legitimate public/private sector cooperative effort to date.
2. To emphasize that Vision 2000 is not a study: rather a process that has, to date, done its best to accommodate all stakeholders.
3. To position Vision 2000 as the agenda maker for San Joaquin's future.
4. To insure that the Vision 2000 Steering Committee is perceived as truly representative and responsive to the community's needs.
5. To keep Vision 2000 free from politics, positioning it as factual, objective and straight shooting.
6. To think multi-level marketing. Everyone benefits from buying in. Everyone loses (upstream and downstream) if Vision 2000 does not create change.
7. To "keep the Vision Alive." The findings and recommendations and process of Vision 2000 must generate a refined set of community and Business Council goals and objectives.

VISION 2000
'95 Re-Look
Steering Committee - Roster

•Ron Addington	The Business Council, Inc.
Bill Atchley	University of the Pacific
George Barber	Board of Supervisors
George Brown	Jardine Insurance Brokers
Joan Darrah	Mayor - City of Stockton
Dave Ennis	Councilmember - Mayor pro-tem
•Fritz Grupe	The Grupe Company
Joe Harrington	Lodi Memorial Hospital
Darlene Hill	Mayor - City of Lathrop
Dorothy Indelicato	Delicato Vineyards
Brent Ives	Tracy City Councilmember
•Kathleen Lagorio Janssen	Ace Tomato/Lagorio Communications
Ken Lam	Centro Mart
John Ledbetter	Vino Farms, Inc.
Mike Locke	San Joaquin Partnership
Marcelo Lopez	Private Industry Council
Phil Loughlin	Delta College
Terry Mack	Tracy Community Memorial Hospital
Steve Mann	Lodi City Councilmember - Mayor pro-tem
•Tom Matthews	Tracy Press
Bruce Mettler	San Joaquin County Farm Bureau
Paula McCloskey	Stockton Chamber of Commerce
•John Nunn (Co-Chair)	American Savings
Leroy Ornellas	San Joaquin County Ag. Advisory Board
Curt Pernice	Ripon City Councilmember
Bill Perry	Manteca City Councilmember
Ed Schroeder	St. Joseph Medical Center
•Tom Shephard	Neumiller & Beardslee
Virgil Smith	The Record
•Steve Stocking	Sierra Club, Delta Sierra Group
•Doug Urbick (Co-Chair)	Teichert Construction
Rick Wentworth	S.J. County Schools
•Fred Weybret	Lodi News Sentinel

Meetings:

Direction/Focus Meeting	Early October
Review Workshop/Key Issues	Late November
Review Draft Report	Mid January
Review Final Report	Mid February

- Executive Committee

October 7, 1994

Ronald S. Addington
Executive Director
Business Council, Inc. of San Joaquin County
2800 W. March Lane, Suite 473
Stockton, CA 95219

Dear Mr. Addington:

This is a contract for ESG to assist the Business Council of San Joaquin County in updating its economic development strategy, Vision 2000.

WORK SCOPE

Stakeholder Interviews. ESG will work with The San Joaquin Business Council in identifying the players who need to be interviewed. The stakeholders should be those who will really take responsibility for implementing the strategic plan update, or who would actively work against economic development issues. Assuming that the Business Council handles logistics, ESG will spend nine person-days interviewing stakeholders in a focus group setting -- three to eight individuals with common interests -- for one and one-half hours each. This format will enable us to interview 100 to 200 individuals in three days. We will discuss their perceptions of the economic issues, the goals their group has regarding economic development, the economic development projects they believe are worthwhile and necessary, and any other related issues that are important to them. We will follow-up with one person-day of telephone interviews with key individuals who may have been missed, or to discuss key topics in more length. We will transcribe our stakeholder interview notes and sort them by issue, making explicit identification of alliances and conflicts among stakeholder groups. These interviews provide the basis for developing a strategic plan that responds to the economic development constituency. Timing: September/October. Fee: \$7,500.

Economic & Fiscal Analysis. The purpose of this task is to provide the "wake-up call" -- to motivate the need for economic development actions. We will review the county economy and sub-regional economies to identify the trends that have occurred in the four years since the first strategy was prepared. We will show how the County's sluggish economy has affected key stakeholder groups. In particular, we will show how economic performance and population growth has affected the revenue base and fiscal conditions for the County and all of its cities. We will prepare an easily-digested, visually-oriented economic analysis that is suitable for widespread distribution. Timing: November. Fee: \$7,000.

Business climate analysis. ESG will update the strengths and weaknesses of San Joaquin County and all cities as a business site location. Based on the stakeholder interviews, additional telephone interviews, the questionnaires provided to the Partnership from ESG to distribute to the cities, secondary data, and previous ESG local economic development strategies, we will provide a comparative analysis of San Joaquin County/cities with nearby economic development competitors, and with key out-of-state competitors. We will evaluate some forty-five business climate factors in three key categories:

- *Pure Location Factors* -- geographic location, consumer and business markets, transportation, and real estate availability and costs.
- *Human Resource Factors* -- demographic growth, labor markets, labor quality, education and training systems, and quality of life factors.



- **Finance and Public Sector** – capital availability, public sector investments, and public sector costs.

Dovetailing on other projects that we will be completing in your timeframe, ESG will compare San Joaquin County, Stockton, Lodi, Tracy, Manteca, Ripon, Escalon and Lathrop to Bay Area, Central Valley, and out-of-state competitors. These include Santa Clara, Alameda, Contra Costa and Solano Counties in the Bay Area; Sacramento and Stanislaus Counties in the Central Valley; and metro Reno, Salt Lake City, Phoenix, Denver, and Albuquerque.

We will prepare an easy-to-read, graphically oriented report for stakeholder distribution. It will highlight the main business climate strengths and weaknesses, drawing conclusions for economic development marketing and for necessary community improvements. Timing: November. Fee: \$5,000.

Target Industry Analysis. Based on the business climate analysis, we will update the target industries for San Joaquin County. These will be compared to target industry ratings for two competitor counties in the Bay Area. ESG will deliver tabled information on target industries, but will not prepare a report. Timing: November. Fee: N/A.

Key Issues. Combining the stakeholder interviews, the economic analysis, and the business climate analysis, we will summarize the key economic development issues – the problems that need to be addressed, possible opportunities and constraints, business climate conclusions relative to marketing and community improvements, and how a strategy can help achieve the goals of key stakeholder groups. This will be prepared in an easy-to-read report for widespread distribution. Timing: November. Fee: \$3,000.

Participating in a Community Leadership Workshop. ESG will participate in two community leadership workshops (to be scheduled the same day, or consecutive days), which will be led by another facilitator. We will observe and take notes to assist us in preparing the final strategic plan. Timing: December. Fee: \$1,500.

Strategy & Implementation Plan. ESG will update the economic development implementation plan, bringing it to the detail that is possible. After the workshop, we will prepare an outline of the plan and review it with the steering committee. Then, based on the outline approved by the steering committee, we will prepare a draft plan. We will review it with the steering committee in one iteration, and then prepare the final plan. The implementation plan will address business development, community improvements, and organization. Working with the detail available within this budget, we will be as specific as possible regarding specific projects, specific timing, specific roles, and specific budgets/funding sources. The final plan will be prepared in an easy-to-read format for widespread distribution. Timing: December-February. Fee: \$6,000.

Steering Committee Meetings. ESG will attend two steering committee meetings over the course of the project. Key review dates: (1) economic analysis, business climate analysis/key issues, community leadership workshops, and (2) one review meeting for the strategy/implementation plan. Timing: December and January. Fee: \$1,000.

SCHEDULE

ESG will complete the work by March, 1995, but will submit a draft plan for stakeholder review by January 15, 1995. It is the responsibility of the Business Council to ensure that stakeholders understand that there will be a single revision of the implementation plan.


COMPENSATION AND PAYMENT

This is a fixed fee contract of \$31,000, with budgets for seven separate tasks. We will submit monthly invoices, reflecting progress billings for time and expenses actually expended. Invoices are due and payable upon receipt, and we will charge 1.5% monthly interest for all payments made after 30 days of receipt.

If you are in agreement with the terms and conditions of this contract, please sign and date in the space provided below.

Ron, Mike Skaggs and I are looking forward to working with you, other members of the Business Council, and the San Joaquin Partnership.

Sincerely,



Jack Tomasik
President

10/7/94

Date

Ronald S. Addington
Executive Director
Business Council, Inc. of San Joaquin County

Date

VISION 2000

The Re-Look

BUDGET

Gaebler Critical Issues (paid)	\$ 6,500
Vision 2000 Update	
Economic Strategies Group	\$ 31,000
Conklin Marketing	20,000
Printing/Mailing/Etc.	5,000
Workshops	3,500
Miscellaneous (5% Contingency)	3,500
<i>Total</i>	<u>\$ 69,500</u>

BUSINESS SPONSORS

Confirmed to Date

Bank of Stockton	\$ 6,500
Stockton Savings	6,500
American Savings	6,500
San Joaquin Partnership	5,000
St. Joseph's	5,000
Anheuser-Busch, Inc.	5,000
The Record	5,000
The Grupe Company	5,000
Teichert Construction	2,500
Union Safe	1,500
Westside Bank	<u>1,000</u>
	\$ 49,500

10/7/94

	Jul '94					Aug '94					Sep '94					Oct '94					Nov '94					Dec '94					Jan '95				Feb '95				Mar '95						
Name	26	3	10	17	24	31	7	14	21	28	4	11	18	25	2	9	16	23	30	6	13	20	27	4	11	18	25	1	8	15	22	29	5	12	19	26	5	12	19	26	2				
Campaign Preparation/Fundraising																																													
Business Council Board Approval																																													
S J Partnership Endorsement																																													
Buy-in Presentations to Cities/Counties																																													
Data Collection																																													
- Economic & Fiscal Analysis																																													
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